

INSTRUCTIONS

The ATS Library Form has been designed to gather data regarding library holdings and administration. Please refer to the current edition of the *Anglo-American Cataloging Rules* if there are questions regarding terminology.

The term **library** used throughout these instructions refers to collections of the **ATS member institution**. Report only activity and/or collections for which the ATS member institution library has administrative and budgetary responsibility. If the library is part of a larger library, figures may need to be estimated or prorated.

Please respond to each item on this report in the space provided. If an exact figure is not available for a particular item but the amount is known to be greater than zero, enter an estimate of the amount. Items that are left blank will be interpreted as zero or not relevant to your library. If necessary, request help from your business office in providing expenditures and personnel salary data.

LIBRARY STATISTICAL RECORDS REPORT

In consultation with the American Theological Library Association (ATLA), the ATS Library Form will be the only form that libraries need to complete for the ATLA Statistical Records Report. If you do not want the statistical data from your library included in the ATLA Statistical Records Report, you must check the box on the ATS Library Form that indicates that you do not give permission to send the information to ATLA.

Part A: LIBRARY CHARACTERISTICS

Question 1: Please mark only one description of your institution's library. Normally a departmental or branch library maintains its own separate collection and provides discrete services for the theological school. An integrated library collection is intershelved with the university or college collection. A shared library facility houses an organized collection of materials that is jointly administered by more than one educational institution or received funds or operating expenditures from more than one educational institution.

Question 2: In the organizational structure of the institution, is the responsibility for these services within the library or another department? Responsibility involves financial and staff support for these services. For example, are you responsible for managing the campus network? Do you run courseware or are you responsible for scanning?

Question 4: Refer to ATS Standard 10 for definitions of these programs and ATS recommendations for library services.

Part B. THE LIBRARY AS PLACE

Question 1: If your institution has multiple library locations, choose and list the information for up to three primary sites. Renovation includes substantial expansion, alteration or upgrading to some component of the physical facility. Do not include cosmetic changes, such as painting, collection shifting, carpeting, etc. Indicate cost if the renovation was within the last five fiscal years. If part of a larger campus renovation, estimate library expense based on percentage of square footage of the project.

Question 2: Offsite storage and/or shelving might be used for archival resource, microforms and/or other non-book physical objects. Describe in Line c.

Part C. LIBRARY USE DATA

Line 1: report the circulation transactions including: check-outs, renewals, reserves. Include circulation services provided to distance education programs and extension sites. Exclude check-ins, e-books and in-house use except reserves.

Lines 2 and 3: Enter interlibrary lending and borrowing. Report the number of requests for material (both returnables and non-returnables) provided to other libraries. Include originals, photocopies, and materials sent by fax or other forms of electronic transmission. Include patron-initiated transactions. Exclude requests for materials locally owned and available on the shelves and electronically. Exclude circulation services provided to distance education programs and extension sites.

Line 4: Report the total number of sessions during the year of presentations made as part of formal library instruction programs and through other planned class presentations, orientation sessions and tours. Do not include meetings sponsored by other groups using library meeting rooms or training for library staff. The purpose of this question is to capture information about the service the library provides to its patrons.

Line 5: Report the total number of participants in the presentations reported on line 4. For multi-session classes with constant enrollment, count each person only once.

Line 6: Report personal, one-to-one instruction in the use of sources in-person, by telephone or electronic communication. Include referrals. Exclude directional questions. Please indicate if the figure is based on sampling or if other special situations exist.

Part D: COLLECTION GROWTH AND HOLDINGS

Column (A). Prior Year Net Holdings: Enter the total number of items in each category at the close of the previous report period.

Column (B). Purchased Items Added: Report the number of volumes/units purchased during the fiscal year being reported.

Column (C). Gifts Added: Report the number of volumes/units added in each category for the fiscal year being reported. Count exchange volumes received as gifts unless the library materials budget carries the expense of providing the items offered in exchange.

Column (D). Items Deleted: Report the number of volumes/units removed during the fiscal year.

Column (E). Adjustments: Indicate positive or negative adjustments needed for instances such as: inventory corrections, bar-coding projects, corrections to previous years' reporting.

Column (F). Current Year Net Holdings: Compute this figure by adding the amount in columns (A), (B), and (C) and subtracting (D) volumes/units withdrawn during the fiscal year reported. If applicable, add or subtract the adjustment shown in Column (E).

Line 1. Printed Books (Volumes): Report on this line physical *volumes* of printed books. Include as well serial volumes that are not received on subscription or standing order.

Line 2. Printed (Bound) Periodical Volumes: Report retrospective purchases and newly bound serials under column (B).

Line 3. Current Print Periodicals Received: Report the number of titles of print periodicals received on subscription or by gift.

Line 4. Microforms: Report the number of physical reels of microfilm and sheets of fiche.

Line 5. Music Scores: Report the number of physical units of these items.

Line 6. Manuscripts and Archives: These can be reported as either Number of Items or it can be a measurement of Linear Feet. Please be sure to indicate either (I) for Items or (L) for Linear Feet. **A linear foot is roughly calculated as a cubic foot or 12x12x12 inches. For a more precise definition and calculation, refer to the Society of American Archivists Glossary available at www.archivists.org.**

Line 7. Other Non-book Physical items: Include all audio and/or visual materials in all physical formats, and all other physical materials not included in the categories above. Exclude electronic databases, e-journals, e-books, etc.

PART E. PERSONNEL AND SALARY DATA:

The personnel and salary data section is for the previous fiscal year in order to maintain consistent timing with the other expenditure data on the library form. Only total compensation by categories of personnel is to be reported. (The current individual salary and benefits of professional library staff are reported elsewhere in the institutional report.)

Column (A). Staff FTE: Compute the full-time equivalent for each individual in the category by relating the individual's regular number of hours of work to those worked by someone who is considered full-time. Include staff in religious orders, volunteers and friends of the library groups in Line 4. Maintain decimals and compute a total for the category. Then round the total to two decimal places and enter this number on the form

Column (B). Total Compensation: Enter the total compensation for each category of individuals, including salaries, wages, and fringe benefits, such as medical insurance and pension payments.

Lines 1 and 2: Record exempt (salaried) and non-exempt (hourly) employees as defined by the US Department of Labor. Include all staff whose salaries are paid from the library budget rather than other departmental budgets.

Line 3. Students: Employees who are also students of the responding institution and whose full wages are carried in the library budget. Persons who are on salary and who also happen to be taking courses should be counted as staff and not as students.

Line 4: Contributed Services: Include staff in religious orders, volunteers and friends of the library groups, etc.

Line 5. Total Library Staff FTE: The program calculates a total for column (A).

Line 6. Total Library Staff Compensation: The program calculates a total for column (B). This total will also be posted to Part F, Financial Summary, Line 10.

PART F. FINANCIAL SUMMARY

Report the expenditures for each category for the most recently completed fiscal year.

Line 1 - 6: refer to definitions in Part D

Line 7: Total for Electronic Resources for Collections: Include expenditures for electronic resources for collections both leased and owned. Include e-journals, e-books, databases, platform access fees, etc. Exclude ILS and other software maintenance fees.

Line 8. Total for Collection Expenditures: Report the expenditures for total library materials that were computed from lines 1 - 7.

Line 9. Total for Binding and Preservation: The total for binding should include costs of both in-house and commercial binding.

Line 10. Total Library Staff Compensation: Report the total for library staff compensation that was computed in Part E, line 6, column (B).

Line 11: Total for Library Staff Development: Cost for continuing education courses, conferences and associated travel if paid from library budget.

Line 12. Total for Computer Services: The total for computer services should include the costs of bibliographic utilities, ILS and software maintenance, hardware costs, data-networking costs, and in-house computer services if paid from in library budget.

Line 13. Total Other Expenses: Include here any other library expenses not reported in lines 1 through 12 above. These would include non-computer equipment and furnishings, consultants, telephone, insurance, postage, supplies, etc.

Line 14. Total Library Expenditures: The program calculates library expenditures reported in lines 3 through 13.

ARF PROGRAM NOTES

Gray shaded fields: For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. The gray fields represent degree program areas that are not applicable to the member school and the program will skip over these fields during data entry. As there are always exceptions, data entry is possible within these fields; however an explanation should be entered in the comments field of the relevant form. Some forms require explanations and the form cannot be saved without entering comments.

Blue shaded fields: The blue shaded fields represent fields for which data entry is not allowed. These fields, such as Total fields are calculated or contain amounts that are brought forward from another part of the form—the type in these fields is navy blue.

Totals: Column and row totals are generated automatically during data input—the type in these fields is navy blue. Some forms require certain totals to match other forms' totals or totals on other pages. There is a small tolerance for differences in the totals to account for differences in rounding.

Decimals: Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

Comments: A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.